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Infants', Toddlers', Girls' and Boys' Wear

FAIRCHILD FACT FILE

Prepared by

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Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

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Standard Book Number: 87005-457-0

Printed in the United States of America

INFANTS', TODDLERS', BOYS' & GIRLS' WEAR

Market Trends

Retail sales of children's wear, as a whole in 1982 were modestly ahead of 1981, according to industry analysts. Consumers who held back on purchases of other items were more inclined to spend for their children, and the outlook is for a significant gain over the $14-$15 billion sales total registered last year, depending on the strength of recovery in the general economy.

Several factors favor growth in the market, particularly for younger children. The number of births has been on the rise, gains are being registered in the buying power of "dual-income" families, and the number of first-births, which generate a disproportionately large share of the infants' wear market, is now unusually high. Recent studies indicate that spending by parents on their first child averages as much as 130% higher than spending on subsequent children. The number of new mothers who are returning to the labor force after giving birth is growing, and this is expected to generate increased spending for children as family income rises.

A stimulus to the children's wear market is coming from licensing activities, and growing awareness of designer names in youth apparel. According to an industry newsletter, licensing as a whole represented $13.7 billion in sales in 1981, of which about a third came from sales of apparel and accessories. Licensed "characters" have always been popular in children's wear; the market is big but reliable figures on the exact size are not available. Market sources indicate that licensed apparel has been sold almost entirely by large chains and mass merchandisers, thus dramatically increasing these store types' share of the overall children's wear business.

Although figures on import penetration in the children's wear market are difficult to determine due to its combination with women's and men's wear, it is apparent that imports are as major a concern to domestic children's wear manufacturers as they are to the rest of the apparel industry. Orders for major lines from Europe in 1983 are well ahead of the 1982 level, according to importers' representatives (Women's Wear Daily, March 14, 1983). These imports are not only being spurred by the strength of the U.S. dollar but also by a change in the perception of the European lines as being a low-priced, low-quality imitation of domestic products.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. In intra-census years the Bureau compiles an annual survey of a sample of manufacturers, and reports from these are adjusted for comparability with findings in the complete census.

For a selected group of major industry classifications, including children's outerwear (SIC 236), the U.S. Bureau of Industrial Economics has published estimates on manufacturing activity for 1981 and 1982 (1983 U.S. Industrial Outlook) as noted in the following table. According to this source, value of shipments in the industry declined at a compound annual rate of - 0.3% in constant 1972 dollar terms, in the period 1972-1982.

GENERAL INDUSTRY STATISTICS

Trends in Value of Shipments, 1972-1982

	Children's Coats, Suits, Dresses, Blouses, Total (SIC 236)			Children's Dresses & Blouses (SIC 2361)		
	1982	1981	1972	1982	1981	1972
Current dollars (mils.)	$2,166	$2,100	$1,422	$1,035	$1,006	$ 655
Constant (1972) dollars (mils.)	1,389	1,401	1,422	632	650	655
Compound annual rate of growth (loss) 1972-1982	- 0.3%			- 0.4%		

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

Children's Dresses & Blouses (SIC 2361*)

	1980	1979	1977
Number of companies	na	na	455
Number of establishments, total**	436	457	519
Number with 20 or more employees	320	327	374
Employees, total (thous.)	37.0	35.5	35.2
Production workers (thous.)	31.7	30.8	30.4
Payroll (mil. $)	$ 288.2	$ 248.4	$228.4
Value added by manufacture # (mil. $)	553.3	476.5	444.6
Value of industry shipments ## (mil. $)	968.5	896.0	824.7
Capital expenditures, new (mil. $)	7.0	0.8	6.4

Children's Coats & Suits (SIC 2363*)

	1980	1979	1977
Number of companies	na	na	108
Number of establishments, total**	90	93	120
Number with 20 or more employees	55	62	70
Employees, total (thous.)	6.3	6.5	6.7
Production workers (thous.)	5.3	5.7	5.7
Payroll (mil. $)	$ 50.3	$ 48.8	$ 45.8
Value added by manufacture # (mil. $)	54.3	94.3	90.2
Value of industry shipments ## (mil. $)	176.5	178.7	173.8
Capital expenditures, new (mil. $)	2.4	3.1	1.3

GENERAL INDUSTRY STATISTICS

Children's Outerwear, n.e.c. (SIC 2369*)

	1980	1979	1977
Number of companies	na	na	307
Number of establishments, total**	265	281	363
Number with 20 or more employees	200	205	242
Employees, total (thous.)	29.0	26.5	29.3
Production workers (thous.)	24.1	22.7	25.1
Payroll (mil. $)	$ 215.9	$ 182.4	$ 184.9
Value added by manufacture # (mil. $)	488.4	364.9	344.4
Value of industry shipments ## (mil. $)	885.2	720.0	718.8
Capital expenditures, new (mil. $)	11.5	8.0	6.7

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, shown below:

SIC 2361 comprises establishments primarily engaged in manufacturing girls', children's and infants' dresses, blouses, waists, and shirts, cut and sewed from purchased woven or knit fabric.

SIC 2363 covers establishments primarily engaged in manufacturing girls', children's and infants' coats and suits, cut and sewed from woven and knit fabric.

SIC 2369 includes establishments primarily engaged in manufacturing girls', children's and infants' outerwear, not elsewhere classified, cut and sewed from purchased woven or knit fabric. It covers items such as tops, playwear, swimwear, robes, skirts, headwear, neckwear, etc.

NOTE: Separate industry figures are not available on boys' wear and on children's underwear and nightwear manufacturers. These are combined in industry data on men's and boys' manufacturers and women's and children's manufacturers, which are included in other Fact Files covering specific apparel categories.

**Each business location is counted as a separate establishment. Figures for 1979 and 1980 are from County Business Patterns (U.S. Census Bureau).

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

(continued)

GENERAL INDUSTRY STATISTICS

##The value of industry shipments includes both primary and secondary products made by manufacturers in the industry, as well as receipts for contract work and miscellaneous receipts. The value of primary products made in this industry, as well as the value of these products made by secondary producers is reported in tables on product shipments on pages 25-28.

na = not available
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980

Employment & Earnings

Total employment in children's outerwear fell by 5.8% in 1982 according to the U.S. Bureau of Labor Statistics, declining to a total of 60,200. In the children's dress and blouse segment of the market, total employment also declined but not as rapidly, dropping 4.4% to 26,000 during the same period.

Production workers in children's outerwear averaged 35.2 hours a week in 1982 (not including overtime) compared with 36.1 in 1981, a decrease of 2.5%. During the same period, hourly earnings increased by a slight 1.4%. For production workers in the dress and blouse category, employment also fell, down 4.5% from the previous years total while average weekly earnings showed only minimal gains.

The U.S. Bureau of Industrial Economics reported that in the period 1972-1982, production worker employment in the children's outerwear industry declined at a compound annual rate of 0.8%, while total employment registered a compound annual rate of decline of 0.3%.

Employment & Earnings in Children's Wear Industries, 1979 - 1982

	Annual Averages				% Change
	1982	1981	1980	1979	1982/1981
Children's outerwear (dresses, blouses, coats, suits)(SIC 236)					
All employees (thous.)	60.2	63.9	64.4	65.7	- 5.8%
Production workers (thous.)	51.0	54.1	55.1	56.8	- 5.7
Average weekly earnings	$166.50	$164.26	$151.20	$137.86	+ 1.4
Average weekly hours	35.2	36.1	36.0	35.9	- 2.5
Average overtime hours	1.0	1.2	1.2	1.2	- 16.7
Dresses & blouses (SIC 2361)					
All employees (thous.)	26.0	27.2	27.3	27.5	- 4.4
Production workers (thous.)	23.2	24.3	24.5	24.8	- 4.5
Average weekly earnings	$164.85	$161.36	$146.91	$136.42	+ 2.2
Average weekly hours	35.0	35.7	35.4	35.9	- 2.0
Average overtime hours	0.9	1.1	0.9	1.2	- 18.2

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Plants producing children's wear are for the most part small operations with fewer than 50 employees. However, although figures for larger operations are generally withheld by the BLS to avoid disclosure of individual companies, plants with over 100 employees (a relatively small share of the total number) account for a major percentage of employment and of total shipments.

In dresses and blouses, for example, 21.1% of the plants accounted for 58.8% of total employment. According to the U.S. Bureau of Industrial Economics, in 1982 the four largest companies accounted for 15% of the children's dress & blouse industry shipments.

Children's Apparel Industries by Employment Size, 1980

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Dresses & blouses (SIC 2361) total	436	100.0%	31,998	100.0%
By establishment size:				
Under 20 employees	116	26.6	1,108	3.5
20 - 49 employees	127	29.1	4,690	14.7
50 - 99 employees	101	23.2	7,411	23.2
100 - 249 employees	72	16.5	11,612	36.3
250 or more employees	20	4.6	7,177	22.5
Coats & suits (SIC 2363) total	90	100.0	5,557	100.0
By establishment size:				
Under 20 employees	35	38.9	(D)	na
20 - 49 employees	22	24.4	760	13.7
50 - 99 employees	21	23.3	1,536	27.6
100 - 249 employees	7	7.8	902	16.2
250 or more employees	5	5.6	(D)	na
Other outerwear (SIC 2369) total	265	100.0	26,961	100.0
By establishment size:				
Under 20 employees	65	24.5	(D)	na
20 - 49 employees	67	25.3	2,321	12.0
50 - 99 employees	46	17.4	3,322	12.3
100 - 249 employees	59	22.3	9,357	34.7
250 or more employees	28	10.6	(D)	na

na = not available
(D) = withheld to avoid disclosure

Source: U.S. Bureau of the Census, County Business Patterns, 1980 (CBP-80-1)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios in the Children's Wear Industries, 1977

	Value of Industry Shipments (Mil. $)	Percent accounted for by: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Dresses & blouses (SIC 2361)	$824.7	15%	23%	41%	64%
Coats & suits (SIC 2363)	173.8	32	47	72	92
Outerwear, n.e.c. (SIC 2369)	718.8	24	36	57	76

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Concentration Ratios in Manufacturing, MC77-SR-9

Employment & Share of Shipments in Large Plants in the Children's Wear Industry, 1981

	Number of Plants With 20+ Employees	Number of Plants With 100+ Employees	% of industry shipments accounted for by plants With 100 or more employees
Dresses & blouses (SIC 2361)	259	96	71%
Coats & suits (SIC 2363)	56	21	71
Outerwear, n.e.c. (SIC 2369)	250	101	77

Source: Sales & Marketing Management, "Survey of Industrial Purchasing Power," April 1982. All Rights Reserved.

By Region

New York accounted for the major share of plants in all three categories of children's wear reported on in the 1977 Census of Manufactures. The segment with the highest concentration of its plants located in New York was the suits and coats group where nearly two out of every five plants were located in that state.

Pennsylvania ranked second in the number of plants in two out of the three measured categories in 1977 with New Jersey surpassing it with 27 plants producing children's suits and coats in 1977.

GENERAL INDUSTRY STATISTICS

By Region

Leading Manufacturing States in Children's Wear Industries, 1977

	No. of Establishments		Value Added By Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
	Total	With 20+ Employees		
Children's dresses & blouses, (SIC 2361)				
Leading states:				
New York	154	91	$ 103.4	$ 241.9
Pennsylvania	79	65	61.8	101.7
New Jersey	56	41	32.8	71.8
California	35	20	32.5	73.5
North Carolina	35	34	37.5	61.2
Florida	22	14	9.0	17.2
Texas	20	16	22.8	35.3
Georgia	8	6	2.8	4.0
U.S. total	519	374	444.6	824.7
Leading states, total	409	287	302.6	606.6
Percent of U.S. total	78%	77%	68%	74%
Children's suits & coats (SIC 2363)				
Leading states:				
New York	46	19	$ 21.5	$ 55.4
New Jersey	27	13	11.1	21.1
Pennsylvania	10	8	9.7	12.7
North Carolina	6	5	3.8	5.5
Georgia	5	4	2.4	3.9
U.S. total	120	70	90.2	173.8
Leading states, total	94	49	48.5	98.6
Percent of U.S. total	78%	70%	54%	57%
Children's outerwear, n.e.c., (SIC 2369)				
Leading states:				
New York	121	59	$ 56.7	$ 142.3
Pennsylvania	31	28	30.9	50.8
New Jersey	28	17	12.1	26.1
North Carolina	22	19	33.0	56.6
Florida	16	11	13.5	26.3
Massachusetts	16	9	13.9	26.6
Alabama	15	11	23.2	43.3
Georgia	13	13	28.3	51.2
Virginia	7	7	16.4	41.3
Tennessee	6	5	8.7	14.1
U.S. total	363	242	344.4	478.6
Leading states, total	275	179	236.7	718.8
Percent of U.S. total	76%	74%	69%	67%

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series MC77-1-23C.

GENERAL INDUSTRY STATISTICS

Operating Ratios

The following financial results were compiled by the Federal Trade Commission, in its Annual Line of Business Report, released November 1982.

Operating Ratios of Children's Outerwear Producers, 1976

	Children's Outerwear
Operating income to assets	0.2
Operating income to sales	0.1
Media advertising expense to sales	0.5
Total selling expense to sales	9.2
Total assets to sales	40.2

Source: Federal Trade Commission,
Bureau of Economics,
Annual Line of Business Report, 1976
(Issued 1982)

PRODUCTION

Children's & Girls' Wear

Annual data on the production of major types of children's & girls' wear, based on a survey of all known manufacturers and jobbers (except very small firms), is reported in the Current Industrial Reports issued by the U.S. Bureau of the Census. In 1981 a number of manufacturers not previously included in the annual surveys were added and this has affected comparability of 1981 and 1980 data to varying degrees.

After adjusting data for comparability with the prior year, the largest gain in production in 1981 was registered by the girls', sub-teen & teenage girls' category, whose cuttings were up nearly 20% from the preceding year.

However, the majority of groups reported on by the Census Bureau showed declines in production in 1981 over 1980. The largest decline in 1981 was registered by the coats and legging sets, snowpants sets, and ski and snow suits whose total fell to 2.3 million units, a decline of 44% from the preceding year.

Production of Specified Types of Children's & Girls' Wear, 1981
(Thousands of Units)

	1981	Estimated % Change 1981/1980 (Adjusted)
Dresses, total	74,136	+ 3.3%
Girls', sub-teen & teenage	24,048	- 13.5
Children's	30,888	- 5.0
Infants' & toddlers'	19,200	+ 6.0

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear, 1981
(Thousands of Units)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Blouses (excluding knit outerwear sport shirts), total	44,088	- 6.8%
Girls', sub-teen & teenage	28,212	- 8.3
Children's, infants' & toddlers'	15,876	- 3.7
Knit outerwear sport shirts, except sweatshirts, total	133,260	- 0.1
Girls', sub-teen & teenage	15,912	- 7.0
Children's	71,280	+ 0.9
Infants' & toddlers'	46,068	+ 1.3
Sweatshirts, total	2,982	na
Sweaters, total	13,056	+ 6.4
Coats, excluding coat & legging sets, total	4,908	- 3.2
Girls', sub-teen & teenage	2,088	- 10.7
Children's & infants'	2,820	+ 2.8
Coat & legging sets, snowpants sets, & ski & snow suits, total	2,256	- 44.2
Raincoats & raincapes, total	420	- 10.3
Jackets, total	7,980	+ 9.8
Vests, total	1,596	+ 5.7
Suits, total	4,848	+ 9.2
Skirts, total	7,752	- 16.3
Slacks, incl. jean-cut casual slacks, total	48,588	+ 1.4
Girls' sub-teen & teenage	15,816	- 21.7
Children's & infants'	32,772	+ 17.3
Jeans & dungarees, total	41,184	+ 10.1
Girls', sub-teen & teenage	11,784	+ 3.4
Children's & infants'	29,400	+ 13.1
Shorts, total	21,888	+ 3.2
Girls', sub-teen & teenage	7,500	+ 19.7
Children's & infants'	14,388	- 0.7
Playgarments, incl. playsuits & haltertops, total	100,272	- 9.5
Girl's, sub-teen & teenage	6,468	+ 7.0
Children's	25,908	- 4.6
Infants' & toddlers'	67,896	- 12.2
Swimsuits, total	11,196	+ 9.5
Panties, incl. pettipants, total	160,092	- 6.1
Girl's & children's	98,748	- 4.4
Infants' & toddlers'	61,344	- 8.8

(continued)

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear, 1981
(Thousands of Units)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Slips, vests & undershirts, total	79,548	- 4.0%
Girls' & children's	25,500	- 4.9
Infants' & toddlers'	54,048	- 3.5
Nightgowns, total	28,404	- 0.3
Girls' & children's	19,740	+ 8.0
Infants' & toddlers'	8,664	- 14.1
Pajamas. incl. heavyweight sleeping garments with feet, total	62,388	- 7.8
Girls' & children's	16,872	- 16.1
Infants' & toddlers'	45,516	- 4.0
Robes, girls', children's, infants'	3,228	- 2.0

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

PRODUCTION

Children's & Girls' Wear

Production of hosiery for infants and children by U.S. mills totaled over 31 million pairs in 1981, up 8.3% over the 1980 total. Knee-highs registered the strongest gains.

Production of Infants' & Children's Hosiery, 1980, 1981
(Thousands of Pairs)

	1981	1980	% Change 1981/1980
Infants' & children's hosiery (sizes 3-8½), total	31,195	28,807	+ 8.3%
Footsocks	794	720	+ 10.3
Anklets	20,494	19,260	+ 6.4
Knee-highs	7,686	6,620	+ 16.1
Waist-highs	1,000	943	+ 6.0
Mid-calf/crew	1,221	1,264	- 3.4

Note: Production of hosiery for boys and girls is not separately reported, but combined in a total on production of hosiery sizes 8-11 which includes women's. For this information, see the HOSIERY FACT FILE.

Source: National Association of Hosiery Manufacturers, 1981 Hosiery Statistics.

Diapers

Production of Infants' Diapers
(Thousands of Units)

	1981	1980	% Change 1981/1980
Diapers, total	115,296	113,220	+ 1.8%
Bird's-eye	55,452	51,108	+ 8.5
Gauze	59,844	62,112	- 3.6

Source: National Cotton Council of America
Cotton Counts Its Customers 1982

Children's & Girls' Wear

The distribution of 1980 and 1981 cuttings of children's and girls' clothing by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' dresses, total	100.0%	100.0%
By construction:		
Woven fabric	64.4	66.6
Knit fabric	21.6	29.2
Construction, n.s.k.	14.0	4.1
By fabric:		
All cotton & chiefly cotton	44.8	37.5
All man-made & chiefly man-made	38.7	55.4
All wool & chiefly wool; All other fabric	3.1	3.2
Fabric, n.s.k.	13.4	4.0
Children's dresses, total	100.0	100.0
By construction:		
Knit fabric	24.7	21.4
Woven fabric	58.1	69.9
Construction, n.s.k.	17.2	8.7
By fabric:		
All cotton & chiefly cotton	20.4	23.9
All man-made & chiefly man-made	62.6	65.4
All wool & chiefly wool; All other fabric; Fabric, n.s.k.	17.1	10.7
Infants' & toddlers' dresses, total	100.0	100.0
By construction:		
Woven fabric	64.3	69.6
Knit fabric	12.6	14.5
Construction, n.s.k.	23.1	15.8
By fabric:		
All cotton & chiefly cotton	17.7	18.1
All man-made & chiefly man-made	58.3	64.4
All other fabric; Fabric, n.s.k.	21.2	17.5
Girls', sub-teen & teenage girls' blouses, exc. knit outerwear sport shirts, total	100.0	100.0
By construction:		
Woven fabric	49.3	58.1
Knit fabric	37.1	32.2
Construction, n.s.k.	13.6	9.7

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' blouses (cont'd.)		
By fabric:		
All cotton & chiefly cotton	18.6%	12.8%
All man-made & chiefly man-made	60.5	72.0
All other fabric / Fabric, n.s.k.	20.9	15.2
Children's, infants' & toddlers' blouses, exc. knit outerwear sport shirts, total	100.0	100.0
By construction:		
Woven fabric	46.6	39.5
Knit fabric	23.8	38.1
Construction, n.s.k.	29.6	22.4
By fabric:		
All cotton & chiefly cotton	39.9	32.0
All man-made & chiefly man-made	45.2	63.8
All other fabric / Fabric, n.s.k.	14.8	4.2
Girls', sub-teen & teenage girls' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	35.4	31.0
All man-made & chiefly man-made	59.0	67.0
Fabric, n.s.k.	5.6	2.0
Children's knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	23.4	30.1
All man-made & chiefly man-made	70.9	65.3
Fabric, n.s.k.	5.7	4.6
Infants' & toddlers' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	20.2	21.9
All man-made & chiefly man-made	71.4	78.1
Fabric, n.s.k.	8.4	--
Girls', children's & infants' sweaters, incl. sweater vests, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	79.7	84.5

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', children's & infants' sweaters (cont'd.)		
By fabric (cont'd.)		
All cotton & chiefly cotton, All wool & chiefly wool, Fabric, n.s.k.	20.3%	15.5%
Girls', sub-teen & teenage girls' coats, exc. coat & legging sets, total	100.0	100.0
By fabric:		
All wool & chiefly wool	5.2	(D)
All man-made & chiefly man-made	64.4	38.9
All cotton & chiefly cotton, Fabric, n.s.k.	30.5	(D)
Children's & infants' coats, exc. coat & legging sets, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	44.3	45.0
All wool & chiefly wool	2.1	5.9
All cotton & chiefly cotton, Fabric, n.s.k.	53.6	49.1
Girls', children's & infants' jackets, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	5.9	5.2
All man-made & chiefly man-made	85.4	83.8
All wool & chiefly wool, All other fabric	1.1	1.3
Fabric, n.s.k.	7.8	9.6
Girls', children's & infants' suits, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	16.1	17.9
All man-made & chiefly man-made	73.0	82.1
All other fabric, Fabric, n.s.k.	10.9	--
Girls', children's & infants' skirts, total	100.0	100.0
By construction:		
Woven fabric	57.1	64.0
Knit fabric	10.1	7.8
Construction, n.s.k.	32.8	28.2

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', children's & infants' skirts (cont'd.)		
By fabric:		
All cotton & chiefly cotton	19.8%	22.5%
All man-made & chiefly man-made	60.5	67.9
All wool & chiefly wool, Fabric, n.s.k.	19.7	9.6
Girls', sub-teen & teenage girls' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	77.4	72.9
Knit fabric	2.9	5.0
Construction, n.s.k.	19.7	22.1
By fabric:		
All cotton & chiefly cotton	24.6	24.5
All man-made & chiefly man-made	57.7	53.5
All wool & chiefly wool, Fabric, n.s.k.	17.8	22.0
Children's & infants' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	73.6	80.3
Knit fabric	20.7	18.2
Construction, n.s.k.	5.7	1.5
By fabric:		
All cotton & chiefly cotton	39.0	42.1
All man-made & chiefly man-made	54.9	57.0
All wool & chiefly wool, All other fabric, Fabric, n.s.k.	6.1	0.9
Girls', sub-teen & teenage girls' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	62.8	61.7
All man-made & chiefly man-made	25.9	28.5
Fabric, n.s.k.	11.3	9.8
Children's & infants' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	41.7	52.0
All man-made & chiefly man-made	48.9	36.9
Fabric, n.s.k.	9.5	11.1

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' shorts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	14.7	6.2
All man-made & chiefly man-made	74.9	85.3
Fabric, n.s.k.	10.4	8.5
Children's & infants' shorts, total	100.0	100.0
By construction:		
Woven fabric	56.9	58.7
Knit fabric	39.9	39.2
Construction, n.s.k.	3.2	2.1
By fabric:		
All cotton & chiefly cotton	30.2	31.1
All man-made & chiefly man-made	64.9	65.8
All other fabric } Fabric, n.s.k.	4.9	3.1
Children's playgarments, incl. playsuits & halter tops, total	100.0	100.0
By construction:		
Woven fabric	51.2	72.2
Knit fabric	29.5	22.7
Construction, n.s.k.	19.3	5.1
By fabric:		
All cotton & chiefly cotton	59.5	64.3
All man-made & chiefly man-made	21.8	32.7
Fabric, n.s.k.	18.7	3.0
Infants' & toddlers' playgarments, incl. creepers and rompers, total	100.0	100.0
By construction:		
Woven fabric	41.7	45.7
Knit fabric	52.1	51.5
Construction, n.s.k.	6.2	2.8
By fabric:		
All cotton & chiefly cotton	27.3	23.3
All man-made & chiefly man-made	65.7	73.3
All other fabric } Fabric, n.s.k.	6.9	3.4

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', infants' & children's swimsuits, total	100.0%	100.0%
By construction:		
Woven fabric	19.7	23.2
Knit fabric	80.3	76.8
By fabric		
All cotton & chiefly cotton	0.9	0.9
All man-made & chiefly man-made	96.9	91.6
Fabric, n.s.k.	2.2	7.5
Girls' & children's panties, incl. pettipants, total	100.0	100.0
By construction:		
Woven fabric	9.8	6.6
Knit fabric	90.2	93.4
By fabric:		
All cotton & chiefly cotton	64.9	60.3
All man-made & chiefly man-made	33.5	35.0
Fabric, n.s.k.	1.6	4.7
Girls' & children's slips, vests & undershirts, total	100.0	100.0
By construction:		
Woven fabric	10.9	10.5
Knit fabric	81.3	89.5
Construction, n.s.k.	7.8	--
By fabric:		
All cotton & chiefly cotton	29.6	44.1
All man-made & chiefly man-made	62.6	55.9
Fabric, n.s.k.	7.8	--
Infants' & toddlers slips, vests undershirts & other underwear, exc. panties, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	87.6	90.4
All man-made & chiefly man-made, Fabric, n.s.k.	13.3	9.6
Girls' & children's pajamas incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	15.5	10.9
Knit fabric	72.7	89.1
Construction, n.s.k.	11.8	--

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls' & children's pajamas (cont'd.)		
By fabric:		
All cotton & chiefly cotton	88.2%	100.0%
All man-made & chiefly man-made Fabric, n.s.k.	11.8	--
Girls' & children's nightgowns, total	100.0	100.0
By construction:		
Woven fabric	26.0	40.6
Knit fabric	64.4	59.4
Construction, n.s.k.	9.6	--
By fabric:		
All cotton & chiefly cotton	90.4	100.0
All man-made & chiefly man-made Fabric, n.s.k.	9.6	--
Infants' & toddlers' nightgowns, total	100.0	100.0
By construction:		
Woven fabric	16.9	4.5
Knit fabric	83.1	95.5
Infants' & toddlers' pajamas, incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	3.1	2.6
Knit fabric	78.5	97.4
Construction, n.s.k.	18.4	--
By fabric:		
All cotton & chiefly cotton	0.4	1.7
All man-made & chiefly man-made	76.2	80.3
All other fabric Fabric, n.s.k.	23.4	17.9

n.s.k. = not specified by kind.
(D) = withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

Boys' Wear

As in the children's and girls' categories, the U.S. Census Bureau added a number of manufacturers to their annual surveys which make the basis for production figures reported in the Current Industrial Reports series. However, the effect of these new companies on the final results were only minimal and, therefore, figures on production of boys' wear are for the most part comparable between 1981 and 1980.

The fastest growing category in the boys' wear industry in 1981 was suits (including casual and uniform). Cuttings rose 18.6%, to 4,007 thousand units, from the previous year's total. Close behind were knit sport shirts and work wear which tied with 13.4% growth rates in the one year period.

The largest declines in 1981 were registered by casual sport coats (-42.4%) and jean-cut casual slacks (-38.5%), according to the Census Bureau.

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981

	(Thous. Units) 1981	1980	% Change 1981/1980	Percent of Total 1981
Boys' suits, incl. casual & uniform, total	4,007	3,379	+ 18.6%	100.0%
By fabric:				
All man-made & chiefly man-made	3,592	2,931	+ 22.6	89.6
All wool & chiefly wool	123	193	- 36.3	3.1
All cotton & chiefly cotton / All other fabric / Fabric, n.s.k.	292	255	+ 14.5	7.3
By construction:				
Woven fabric	3,110	2,594	+ 19.6	77.6
Knit fabric	704	656	+ 7.3	17.6
Construction, n.s.k.	193	129	+ 49.6	4.8
Boys' overcoats, topcoats, & tailored suburban & car coats, incl. uniform, total	489	486	+ 0.6	100.0
By fabric:				
All man-made & chiefly man-made	277	266	+ 4.1	56.6
All other fabric	126	153	- 17.6	25.8
Fabric, n.s.k.	86	67	+ 28.4	17.6
Boys' tailored suit-type dress & sport coats, incl. uniform, total	1,184	1,129	+ 4.9	100.0
By fabric:				
All cotton & chiefly cotton	41	120	- 65.8	3.5
All man-made & chiefly man-made	557	601	- 7.3	47.0
All other fabric	586	408	+ 43.6	49.5
Boys' casual (nontailored) sport coats & jackets, total	242	420	- 42.4	100.0
Boys' separate vests, exc. sweater vests total	511	702	- 27.2	100.0
By fabric:				
All cotton & chiefly cotton	370	403	- 8.2	72.4
All man-made & chiefly man-made	141	234	- 39.7	27.6
All wool & chiefly wool / All other fabric / Fabric, n.s.k.	--	65	--	--
Boys' dress shirts, incl. uniform, total	10,080	16,284	- 38.1	100.0
By fabric:				
All cotton & chiefly cotton	6,144	5,124	+ 19.9	61.0
All man-made & chiefly man-made	3,192	3,240	- 1.5	31.7
All other fabric / Fabric, n.s.k.	744	7,920	- 90.6	7.4

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units) 1981	1980	% Change 1981/1980	Percent of Total 1981
Boys' dress shirts (cont'd.)				
By construction:				
Woven fabric	5,640	7,488	- 24.7%	56.0%
Knit fabric	4,356	2,124	+105.1	43.2
Construction, n.s.k.	84	6,672	- 98.7	0.8
Boys' woven sport shirts, total	14,856	18,276	- 18.7	100.0
By fabric:				
All cotton & chiefly cotton	3,804	5,484	- 30.6	25.6
All man-made & chiefly man-made	10,260	11,832	- 13.3	69.1
All wool & chiefly wool All other fabric Fabric, n.s.k.	792	960	- 17.5	5.3
Boys' knit sport shirts, exc. sweatshirts, total	172,932	152,532	+ 13.4	100.0
By fabric:				
All cotton & chiefly cotton	47,376	45,228	+ 4.7	27.4
All man-made & chiefly man-made	103,332	98,928	+ 4.5	59.8
Fabric, n.s.k.	22,224	8,316	+167.2	12.8
By type:				
Full open front shirts	7,877	6,468	+ 21.8	4.6
Partial front opening	44,004	45,588	- 3.5	25.4
T-shirts made for outerwear, incl. tank tops	106,020	89,184	+ 18.9	61.3
Type, n.s.k.	15,036	11,292	+ 33.2	8.7
Boys' sweaters, incl. sweater vests, knit cardigan & pullovers, total	4,704	*	*	100.0
By fabric:				
All man-made & chiefly man-made	3,252	*	*	69.1
All cotton & chiefly cotton All wool & chiefly wool All other fiber Fabric, n.s.k.	1,452	*	*	30.9
Boys' separate dress & sport trousers, including uniform, total	17,844	17,156	+ 4.0	100.0
Woven fabric:				
All cotton & chiefly cotton	6,084	6,111	- 0.4	34.1
All man-made & chiefly man-made	11,416	10,740	+ 6.3	64.0
Fabric, n.s.k.	263	217	+ 21.2	1.5
Knit fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	63	88	- 28.4	0.4
Fabric, n.s.k.	18	--	--	0.1

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units) 1981	1980	% Change 1981/1980	Percent of Total 1981
Boys' jeans & dungarees, total	72,879	76,255	- 4.5%	100.0%
By fabric:				
All cotton & chiefly cotton	56,414	66,376	- 15.0	77.4
All man-made & chiefly man-made	15,658	9,879	+ 58.5	21.5
Fabric, n.s.k.	807	--	--	1.1
Boys' jean-cut casual slacks, total	18,883	30,725	- 38.5	100.0
By fabric:				
All cotton & chiefly cotton	11,155	19,059	- 41.5	59.1
All man-made & chiefly man-made	7,728	11,666	- 33.8	40.9
Boys' shorts, exc. athletic, total	10,659	11,318	- 5.8	100.0
By fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	5,239	7,404	- 29.2	49.2
All other fabric	5,420	3,914	- 38.5	50.8
By construction:				
Woven fabric	5,885	6,446	- 8.7	55.2
Knit fabric	4,774	4,872	- 2.0	44.8
Boys' coveralls, overalls, work pants & jumpsuits, total	4,968	4,380	+ 13.4	100.0
By fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	4,248	4,296	- 1.1	85.5
Fabric, n.s.k.	720	84	+757.1	14.5
Boys' nontailored heavy outer jackets, exc. ski, total	4,992	4,872	+ 2.5	100.0
By fabric:				
All cotton & chiefly cotton	600	576	+ 4.2	12.0
All man-made & chiefly man-made	2,904	2,988	- 2.8	58.2
All wool & chiefly wool All other fabric	192	492	- 61.0	3.8
Fabric, n.s.k.	1,296	816	+ 58.8	26.0
Boys' nontailored light outer jackets, total	4,692	4,740	- 1.0	100.0
By fabric:				
All cotton & chiefly cotton	768	1,104	- 30.4	16.4
All man-made & chiefly man-made	3,120	3,120	--	66.5
All other fabric	804	516	+ 55.8	17.1

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units) 1981	1980	% Change 1981/1980	Percent of Total 1981
Boys' pajamas & other nightwear, exc. robes, total	12,480	17,760	- 29.7%	100.0%
By construction:				
Woven fabric	3,552	9,192	- 61.4	28.5
Knit fabric	8,928	8,568	+ 4.2	71.5
By fabric:				
All cotton & chiefly cotton	3,356	8,448	- 60.3	27.7
All man-made & chiefly man-made	9,024	9,312	- 3.1	72.3
Boys' lightweight knit undershirts with ¼ sleeve, exc. T-shirts made for outerwear, total	62,484	58,092	+ 7.6	100.0
By fabric:				
Cotton/polyester blended fabric	29,640	20,064	+ 47.7	47.4
All cotton & all other cotton blends	32,880	38,028	- 13.5	52.6
Boys' supporter type knit briefs, total	101,100	98,700	+ 2.4	100.0
By fabric:				
Cotton/polyester blended fabric	27,096	22,584	+ 20.0	26.8
All cotton & all other cotton blends	74,004	76,116	- 2.8	73.2

n.s.k. = not specified by kind.
*For 1981 the Census Bureau reported figures on production and shipments of 150 establishments which did not report figures for 1980. Results for the 2 years, therefore, are not exactly comparable. Percent changes on specific product categories are not shown in the above table where 10% or more of 1981 production was accounted for by establishments not reporting data for 1980.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1
Underwear & Nightwear, MA23G(81)-1

MATERIALS CONSUMED IN PRODUCTION

The 1977 Census of Manufactures report on the children's wear industry included the cost of materials consumed or put into production by plants classified in this industry. Following are findings from this report.

MATERIALS CONSUMED IN PRODUCTION

Materials Consumed in the Production of Children's Wear, 1977

	Delivered cost (million $)
Children's dresses & blouses (SIC 2361) total	$ 273.8
Broadwoven fabrics	76.4
Purchased knitted fabrics	69.9
All other materials, supplies & containers	39.1
Materials, containers & supplies, n.s.k.	88.4
Children's suits & coats (SIC 2361), total	67.3
Broadwoven fabrics	21.9
Purchased knitted fabrics	11.3
All other materials, containers & supplies	8.9
Materials, containers & supplies, n.s.k.	25.2
Children's outerwear, n.e.c. (SIC 2369), total	298.6
Broadwoven fabrics	128.8
Purchased knitted fabrics	52.1
All other materials, containers & supplies	52.6
Materials, containers & supplies, n.s.k.	65.1

n.s.k. = not specified by kind.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC-77-1-23C

SHIPMENTS

The latest information on value of shipments of major classifications of children's wear by all manufacturers--both primary and secondary producers--is reported in the Annual Survey of Manufactures, 1980, compiled by the U.S. Bureau of the Census, as summarized in the following table.

An added source of information--the 1983 U.S. Industrial Outlook compiled by the U.S. Bureau of Industrial Economics--estimated the total value of shipments of children's dresses and blouses in 1982 at $1,062 million, gaining almost 8% over the estimate for 1981. The compound annual rate of growth in value of shipments in terms of constant (1972) dollars was reported at 2.0% for the period 1972-1982.

Children's wear classifications (infants', children's, boys', girls') not separately reported by the Census Bureau are combined with data on women's wear and have been included in specific Fact Files on men's or women's wear. The Standard Industrial Code classifications are defined on page 3. However, the following figures cover all producers of the classifications listed, not just manufacturers classified in the specific industry.

SHIPMENTS

Summary of
Value of Shipments by All U.S. Producers
Of Specified Categories of Boys' & Children's Wear - 1979, 1980

	Millions of $		% Change
	1980	1979	1980/1979
Boys' suits, coats & tailored jackets (SIC 23114)	$ 146.0	$ 175.7	- 16.9%
Children's dresses & blouses (SIC 2361)	1,038.1	952.9	+ 8.9
Knit sport shirts	246.7	208.6	+ 18.3
Contract work on dresses & shirts	173.1	156.1	+ 10.9
Dresses & blouses, n.s.k.	618.3	588.3	+ 5.1
Children's coats & suits (SIC 2363)	213.5	217.1	- 1.7
Contract work on coats & suits	25.6	22.2	+ 15.3
Coats, jackets, suits, snowsuits	187.8	194.9	- 3.6
Children's outerwear, n.e.c. (SIC 2369)	877.8	749.2	+ 17.2
Contract work on outerwear, n.e.c.	117.0	105.8	+ 10.6
Girls', children's & infants' outerwear, n.e.c.	760.8	643.4	+ 18.2

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census, 1980 Annual Survey of Manufactures (M80(AS)-2)

Infants', Children's & Girls' Wear

As previously noted in the Production section of this Fact File, starting with the 1981 Current Industrial Report on women's and children's wear, the Census Bureau broadened its coverage of the industry by adding numerous manufacturers to its annual survey. Since newly added companies were not required to report results for previous years, 1981 Census Bureau data are not strictly comparable with that of 1980.

After adjusting for the addition of the new companies added in 1982, jackets registered the largest increase in the value of its shipments of any major reported category, up 43.2%. Children's and girls' suits registered the second largest gain in shipments with manufacturers reporting that the category accounted for 21.7% more dollar shipments in 1982 than 1981.

The largest decline in shipments registered by any overall category in 1981 was the the coat & legging sets, snowpants sets and ski and snow suits group whose value of shipments in 1981 was 44.7% lower than in 1980.

SHIPMENTS

Infants', Children's & Girls' Wear

Shipments of Specified Types of Infants', Children's & Girls' Wear, 1981
(Millions of Dollars)

	1981	Estimated % Change 1981/1980 (Adjusted)
Dresses, total	$ 476.2	- 0.2%
Girls', sub-teen & teenage	162.2	- 10.8
Children's	207.6	+ 7.4
Infants' & toddlers'	106.4	+ 6.1
Blouses (excluding knit outerwear sport shirts), total	174.6	+ 0.1
Girls', sub-teen & teenage	116.9	- 1.5
Children's, infants' & toddlers'	57.7	+ 3.5
Knit outerwear sport shirts, except sweatshirts, total	398.5	+ 8.9
Girls', sub-teen & teenage	62.0	- 17.0
Children's	227.0	+ 21.4
Infants' & toddlers'	109.5	+ 4.4
Sweatshirts, total	8.6	na
Sweaters	60.7	+ 8.4
Coats, excluding coat & legging sets, total	61.8	+ 0.7
Girls', sub-teen & teenage	33.4	- 8.5
Children's, & infants'	28.4	+ 12.6
Coat & legging sets, snowpants sets & ski & snow suits, total	24.0	- 44.7
Raincoats & raincapes, total	6.7	- 5.6
Jackets	65.7	+ 43.2
Vests	4.6	- 8.0
Suits	30.7	+ 21.7
Skirts	55.2	- 0.8
Slacks, incl. jean-cut casual slacks, total	219.7	+ 5.0
Girls', sub-teen & teenage	96.7	- 10.7
Children's & infants'	123.0	+ 20.0
Jeans & dungarees, total	187.7	+ 11.0
Girls', sub-teen & teenage	68.1	+ 6.9
Children's & infants'	119.6	+ 13.5
Shorts, total	62.7	+ 18.2
Girls', sub-teen & teenage	25.0	+ 34.1
Children's & infants'	37.7	+ 9.7
Playgarments, incl. playsuits & haltertops, total	352.2	+ 2.7
Girls', sub-teen & teenage	14.8	+ 11.3
Children's	91.6	- 2.7
Infants' & toddlers'	245.8	+ 4.1
Swimsuits	46.4	+ 14.3
Panties, incl. pettipants, total	92.2	- 4.9
Girls' & children's	61.9	- 1.9
Infants' & toddlers'	30.3	- 10.4

(continued)

Infants', Children's & Girls' Wear

Shipments of Specified Types of Infants', Children's & Girls' Wear, 1981
(Millions of Dollars)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Slips, vests & undershirts, total	$ 71.1	- 2.6%
Girls' & children's	31.3	- 5.5
Infants' & toddlers'	40.0	- 0.2
Nightgowns, total	83.4	- 3.0
Girls' & children's	62.9	+ 0.2
Infants' & toddlers'	20.5	- 11.5
Pajamas, incl. heavyweight sleeping garments with feet, total	207.9	- 3.7
Girls' & children's	62.4	- 9.2
Infants' & toddlers'	145.5	- 0.8
Robes, total	23.4	- 1.8

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

Boys' Wear

Although the Census Bureau also added manufacturers to the CIR covering men's and boys' wear in 1981, the result of this addition was not as dramatic as the addition to the children's wear categories and comparability between 1980 and 1981 was maintained for most categories.

The Census Bureau reports that in 1981 shipments of boy's wear reached $1,938.7 million, well above the total for the previous year. The largest gain in production of boys' wear in 1981 was registered by the lightweight undershirt with ¼ sleeve group whose shipments were up 38.2% from their 1980 level. A close second was the nontailored light outer jackets group whose total was up 27.4% during the period.

The largest declines in shipments in 1981 were registered by the casual sport coats and jackets group, off nearly 50% and in the separate vests, excluding sweater vests group which was down 35.4%.

SHIPMENTS

Boys' Wear

Value of Shipments of Boys' Wear Items -- 1980, 1981

	Value of Shipments (Million $) 1981	1980(r)	% Change 1981/1980**
Boys' wear, total of listed categories*	$ 1,938.7	$ 1,817.7	**
Suits, including casual & uniform	88.3	82.6	+ 6.9%
Overcoats, topcoats, & tailored suburban & car coats, including uniform	9.0	7.5	+ 20.0
Tailored suit-type dress & sport coats, including uniform	30.6	26.4	+ 15.9
Casual (nontailored) sport coats & jackets	3.5	6.9	- 49.3
Separate vests, excluding sweater vests	5.1	7.9	- 35.4
Dress shirts, including uniform	52.1	62.1	- 16.1
Woven sport shirts	81.3	86.3	- 5.8
Knit sport shirts, except sweatshirts	490.2	399.9	+ 22.6
Sweaters including sweater vests, knit cardigans, & pullovers	24.7	14.6	**
Separate dress & sport trousers, including uniform	107.1	95.1	+ 12.6
Jeans & dungarees	506.1	451.0	+ 12.2
Jean-cut casual slacks	158.5	225.0	- 29.5
Shorts, except athletic shorts	29.6	32.3	- 8.3
Nontailored heavy outer jackets except ski	67.4	61.5	+ 9.6
Nontailored light outer jackets	32.4	30.9	+ 4.8
Coveralls, overalls, work pants & jumpsuits	34.9	27.4	+ 27.4
Pajamas & other nightwear, excluding robes	57.1	69.1	- 17.4
Lightweight undershirts with ¼ sleeve, excluding T-shirts made for outerwear	75.2	54.4	+ 38.2
Supporter-type knit briefs	85.6	76.8	+ 11.4

* Does not include hosiery or accessories such as hats, scarves, gloves, neckwear, etc., as these items are not covered by the Commerce Department's Apparel report.

** For 1981 the Census Bureau reported figures on production and shipments of 150 establishments which did not report figures for 1980. Results for the 2 years, therefore, are not exactly comparable. Percent changes on specific product categories are not shown in the above table where 10% or more of 1981 production was accounted for by establishments not reporting data for 1980.

(r) revised.

Source: U.S. Department of Commerce, Bureau of the Census, Current Industrial Reports, MA23E(81)-1 / MA23G(81)-1.

PRODUCER PRICES

While producer (factory) prices for all items rose at a 2.0% pace and that of apparel rose 4.2% between 1982 and 1981, two categories of children's wear bucked this trend towards higher prices by registering declines during this period. Boys' sport shirts and children's dresses both recorded lower price indexes in 1982 than they did in 1981.

Producer Price Indexes For Children's Wear 1979 - 1982
(12/77 = 100 unless otherwise noted)

	Annual Averages				% Change	
	1982	1981	1980	1979	1982/1981	1982/1980
All items (1967 = 100)	299.3	293.4	268.8	235.6	+ 2.0%	+ 11.3%
All apparel (1967 = 100)	193.8	186.0	172.4	160.4	+ 4.2	+ 12.4
Boys' wear						
Sport shirts	143.0	144.1	121.1	111.6	- 0.8	+ 18.1
Denim jeans & jean-cut casual slacks (12/81 = 100)	100.5	na	na	na	na	na
Jeans & jean-cut casual slacks, of other fabrics (12/81 = 100)	99.2	na	na	na	na	na
Work clothing, exc. jeans & work shirts (12/81 = 100)	99.9	na	na	na	na	na
Girls', children's & infants' wear (1967 = 100)	196.0	190.8	171.1	159.2	+ 2.6	+ 14.6
Children's sport shirts	151.8	144.1	121.1	111.6	+ 5.3	+ 25.4
Children's dresses	116.1	117.3	108.3	103.5	- 1.0	+ 7.2
Knee socks	137.3	131.4	119.5	109.5	+ 4.5	+ 14.9

na = not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports of children's wear represent a sizable chunk of the domestic market. However, statistics are not available as the information is combined in Census Bureau import data with women's wear (covered in total in specific Women's Fact Files) or, in the case of boys' wear combined with men's wear.

The Office of Business Economics has reported the following trend in exports of children's dresses, blouses, coats, suits.

Value of Exports, 1972-1982

	Mil. $
Children's coats, suits, blouses, dresses	
1982	$ 15.2
1981	22.7
1980	23.0
1979	12.4
1972	2.2

Source: U.S. Office of Business Economics, 1983 U.S. Industrial Outlook.

Of the 1982 total, children's dresses and blouses (SIC 2361) accounted for $13.4 billion, or 88%.

THE SIZE OF THE MARKET

Births

What has been called the echo birth boom--the babies of the babies of the big boom of the 1950's--has arrived. Last year over 3.7 million children were born 11.3% more than five years earlier and marking the sixth consecutive year in which there has been an increase. The birthrate rose slightly to 16.0 births per 1,000 population in 1982, and the fertility rate also registered an increase, rising to 67.8 from 67.6 in 1981 and comparing with 66.8 in 1977.

The rise in births was to be expected in view of the gains in the number of women in the population of childbearing age. However, the rise has been slower in developing than was expected due primarily to a delay in the age of marriage and delay in the age of childbearing. In 1960, at roughly the crest of the baby boom, of all women aged 20-24, more than 70% were married and almost 55% were mothers. By contrast, of all women of that age in 1980 only half were married and under 40% were mothers.

Part of the rise in the current level of births is due to the fact that older women who had delayed marriage and childbearing in order to pursue their education and careers, are now entering the family formation state. Both marriage and birthrates have been increasing in recent years.

Almost all birth projections assume that the present low fertility level will continue. However, according to the Conference Board, births should rise to about 4.0 million in 1985 and remain fairly stable at that level through the rest of the decade, until it tapers off moderately in the final year or two. This means that within the next few years annual births will be some 27% higher than the low of 3.137 million in 1973, sustained by the size of the population of child-bearing years.

Live Births in the U.S., Birth Rates & Fertility Rates
Selected Years, 1970-1982

Year	Number (thous.)	Birth Rate*	Fertility Rate**
1982(p)	3,704.0	16.0	67.8
1981(p)	3,646.0	15.9	67.6
1980	3,612.3	15.9	68.4
1973	3,137.0	14.8	68.8

(p) provisional
* Live births per 1,000 population
** Live births per 1,000 women 15-44 years of age

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics
Monthly Vital Statistics Report

THE SIZE OF THE MARKET

Births

More than 40% of the live births recorded in 1980 were first births, while second births accounted for 31.7%. The rate of first births is particularly important to manufacturers and retailers of children's wear, because recent surveys indicate that retail dollars spent on first borns are about 130% higher than those spent on following offspring.

Total Youth Population

Due to the increase in the birth totals in recent years there has been growth in the number of children under 5 years of age in the U.S. population. The current total is about 17,846,000 representing a gain of 8.5% compared with 1980. Older age segments of the youth population have declined in size but will benefit from increases in current birth levels in the future, as the population ages.

Trends In The Size of The Children's Wear Market, 1970-1983
(Numbers in Thousands)

	1983	1980	1970	Percent Change 1983/1980	Percent Change 1983/1970
Total, 16 & younger	58,747	59,434	65,905	- 1.2%	- 10.9%
Under 5 years	17,846	16,448	17,166	+ 8.5	+ 4.0
5 to 9 years	15,948	16,595	19,919	- 3.9	- 19.9
10 to 14 years	17,755	18,227	20,853	- 2.6	- 14.9
15 to 16 years	7,198	8,164	7,967	- 11.8	- 9.6

Source: U.S. Bureau of the Census
Current Population Reports, P- 25, 917, 922

The U.S. Bureau of the Census has issued an Advance Report on Projections of the Population of the United States: 1982 to 1950, based on alternative assumptions of key trends. The "middle" of three sets of projections looks for a decrease in the population of primary-school age (5 to 13 years) children from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.

The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990, before increasing to 15.4 million in 2000.

The U.S. Youth Population (Through Age 16)
1982 & Projections to 2000*

	Number (thousands)				% Change	Percent of Total Population			
	1982	1985	1990	2000	2000/1982	1982	1985	1990	2000
Total, all ages	231,997	238,648	249,731	267,990	+ 15.5%	100.0%	100.0%	100.0%	100.0%
Youth, 16 years & younger	58,727	59,248	61,013	63,599	+ 8.3	25.3	24.8	24.4	23.7
Male	30,024	30,304	31,217	32,553	+ 8.4	12.9	12.7	12.5	12.1
Female	28,703	28,944	29,796	31,049	+ 8.2	12.4	12.1	11.9	11.6

(continued)

Total Youth Population

The U.S. Youth Population (Through Age 16)
1982 & Projections to 2000*
(continued)

	Number (thousands)				% Change	Percent of Total Population			
	1982	1985	1990	2000	2000/1982	1982	1985	1990	2000
Under 5 years	17,370	18,462	19,200	17,624	+ 1.5%	7.5%	7.7%	7.7%	6.6%
Male	8,888	9,453	9,831	9,024	+ 1.5	3.8	4.0	3.9	3.4
Female	8,482	9,009	9,369	8,061	+ 1.4	3.7	3.8	3.8	3.2
5 to 9 years	15,945	16,595	18,599	18,758	+ 17.6	6.9	7.0	7.4	7.0
Male	8,153	8,484	9,519	9,601	+ 17.8	3.5	3.6	3.8	3.6
Female	7,791	8,110	9,080	9,157	+ 17.5	3.4	3.4	3.6	3.4
10 to 14 years	18,014	16,785	16,776	19,519	+ 8.4	7.8	7.0	6.7	7.3
Male	9,208	8,584	8,576	9,989	+ 8.5	4.0	3.6	3.4	3.7
Female	8,806	8,201	8,200	9,530	+ 8.2	3.8	3.4	3.3	3.6
15 & 16 years	7,398	7,406	6,438	7,698	+ 4.1	3.2	3.1	2.6	2.9
Male	3,775	3,783	3,291	3,939	+ 4.3	1.6	1.6	1.3	1.5
Female	3,623	3,624	3,147	3,761	+ 3.8	1.6	1.5	1.3	1.4

* Representing the middle in a series of three projections compiled by the Census Bureau, based on varying assumptions on future trends in fertility, mortality and immigration.

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25,
No. 922 (October 1982)

The Youth Population of the U.S.
By Single Years of Age & By Sex, 1982 & 1990 Projections
(Numbers in Thousands)

	1982 Total			1990 Total*		
	Total	Male	Female	Total	Male	Female
Youth, 16 years & younger, total	58,727	30,024	28,703	61,013	31,217	29,796
Under 5 years	17,370	8,888	8,482	19,200	9,831	9,369
Under 1 year	3,649	1,869	1,780	3,832	1,963	1,869
1 year	3,591	1,839	1,752	3,848	1,970	1,877
2 years	3,553	1,817	1,736	3,852	1,972	1,880
3 years	3,354	1,715	1,639	3,843	1,968	1,876
4 years	3,223	1,648	1,575	3,825	1,958	1,867
5 to 9 years	15,945	8,153	7,791	18,599	9,519	9,080
5 years	3,239	1,657	1,582	3,797	1,944	1,853
6 years	3,134	1,601	1,533	3,760	1,925	1,836
7 years	3,195	1,634	1,561	3,717	1,902	1,814
8 years	3,125	1,598	1,527	3,688	1,888	1,801
9 years	3,251	1,662	1,589	3,637	1,861	1,776
10 to 14 years	18,014	9,208	8,806	16,776	8,576	8,200
10 years	3,374	1,725	1,648	3,603	1,842	1,761
11 years	3,728	1,907	1,821	3,407	1,742	1,665
12 years	3,731	1,907	1,824	3,278	1,676	1,602
13 years	3,634	1,855	1,778	3,296	1,686	1,610
14 years	3,547	1,812	1,735	3,193	1,631	1,562
15 & 16 years	7,398	3,775	3,623	19,200	9,831	9,369
15 years	3,638	1,857	1,781	3,254	1,664	1,591
16 years	3,760	1,918	1,842	3,184	1,627	1,556

* Middle series projections.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 922 (October 1982)

U.S. Family Size Based on Number of Children Under 18: 1979 & 1981
(Numbers in Thousands)

	1981	1979	% Change 1981/1979	% of Total 1981
All families, total	60,309	57,804	+ 4.3%	100.0%
No children under 18	29,082	27,433	+ 6.0	46.6
With children under 18	31,227	30,371	+ 2.8	51.8
1 child under 18	12,745	11,882	+ 7.3	21.1
2 children under 18	11,592	11,005	+ 5.3	19.2
3 children under 18	4,616	4,913	- 6.0	7.7
4 children under 18	1,563	1,745	- 10.4	2.6
5 children under 18	460	549	- 16.2	0.8
6 or more children under 18	251	249	+ 0.8	0.4
No children under 6	46,762	44,801	+ 4.4	77.5
With children under 6	13,637	13,003	+ 4.9	22.6
1 child under 6	9,358	9,053	+ 3.4	15.5
2 children under 6	3,649	3,449	+ 5.8	6.1
3 children under 6	569	438	+ 29.9	0.9
4 or more children under 6	61	63	- 3.1	0.1
No children under 3	52,030	50,008	+ 4.0	86.3
With children under 3	8,279	7,796	+ 6.2	13.7
1 child under 3	7,283	6,857	+ 6.2	12.1
2 children under 3	963	898	+ 7.2	1.6
3 or more children under 3	34	41	- 17.1	0.1

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 371 (May 1982).

More than 20% of the population under 18 years old lived with only one parent in 1981 up from 11.9% recorded in 1970, with nearly 90% of these living with their mothers. Although the total number of children under 18 years has declined by 9% in this eleven year period, the total number living with one parent has increased by 54% to a total of 12.6 million.

Of single parent households, the fastest growing since 1971 have been those led by males, whose numbers have increased by 61%, although they account for only a small proportion of the total (only 10%). In 1981, 20.1% of children under 18 years of age were living with only one parent compared with 11.9% in 1970--most of these were with their mothers who were likely to be divorced or separated from their husbands.

THE SIZE OF THE MARKET

Living Arrangements of Persons Under 18 Years Old: 1970 & 1981
(Excludes persons under 18 years old who were maintaining families or sub-families)
(Numbers in Thousands)

	All Races			% of Total	
	1981	1970	% Change 1981/1970	1981	1970
Living arrangements					
Children under 18	62,918	69,162	- 0.9%	100.0%	100.0%
Living with --					
Two parents	48,040	58,939	- 18.5	76.3	85.2
One parent	12,619	8,199	+ 53.9	20.1	11.9
Mother only	11,416	7,451	+ 53.2	18.1	10.8
Divorced	4,912	2,296	+113.9	7.8	3.3
Married	3,540	3,234	+ 9.5	5.6	4.7
Separated	3,112	2,332	+ 33.4	4.9	3.4
Widowed	1,158	1,395	- 17.0	1.8	2.0
Single (never married)	1,807	527	+242.9	2.9	0.8
Father only	1,203	748	+ 60.8	1.9	1.1
Divorced	614	177	+246.9	1.0	0.3
Married	296	287	+ 3.1	0.5	0.4
Separated	261	152	+ 71.7	0.4	0.2
Widowed	181	254	- 28.7	0.3	0.4
Single (never married)	112	30	+273.3	0.2	*
Other relatives only	1,911	1,547	+ 23.5	3.0	2.2
Nonrelatives only	348	477	- 27.0	0.6	0.7

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374

RETAIL SALES

Analysts estimate that the children's wear market in 1982 registered sales of between $14 billion and $15 billion. Recessionary pressures in 1982 were blamed by many retailers for the sub-par growth rate that the industry registered in that year.

Most retailers see no major upswing in children's wear sales in 1983 (Women's Wear Daily, January 3, 1983), although some manufacturers are planning on increases of between 10% and 15% through the fall, predicated on a strong recovery from the recession which stalled consumer spending over the last two years.

Even though the industry has been holding stable since the recession started in 1981, there have been a few bright categories for retailers, including infants' wear, licensed products, (particularly for boys) and girls' dresses. Analysts see the growth of these areas continuing for the near future due to the "baby boomlet" now underway and the increased purchasing power of the now quite common "dual income family."

RETAIL SALES

There was a marked trend away from designer jeans back to basic jeans, and greater demand for basic sweatshirts, shorts and pants for kids in 1982 and early 1983. Activewear also grew in importance, with the influence of the fitness boom making itself felt down to apparel for very small children. The boys' wear market has become increasingly a status, brand conscious market and retailers are identifying with this trend.

RETAIL SALES BY STORE TYPE

A new type of children's wear retailer--the branded outlet or off-price retailer of branded lines--has emerged and is expected to have a growing impact on the market in coming years. They will be a challenge to the established discounters and mass merchandisers, who in the past took a major share of the children's wear market away from department stores and specialty stores.

Data on place of purchase is collected through consumer panel operations which track purchases through diaries maintained by panel members, and findings of this type are covered in the Buying Habits section of this Fact File. The only official information on sales by merchandise line, however, is that compiled by the U.S. Census Bureau in the 1977 Census of Retail Trade. (The next such census will cover data for 1982).

Census information, as noted below, cover stores with payrolls and included are certain types of retailers (drug stores, supermarkets, etc.) which were not required to break out apparel sales--resulting in an understatement of the total market to an extent which varies by type of merchandise.

In addition, store classifications are broad. For example, department stores include discount stores and the retail outlets operated by mail order chains which meet the definition of a department store based on merchandise carried and size. However, the following tables from the census will provide a broad outline of market share by store type.

Infants' Wear

Department stores (which include department stores operated by mail order chains, as well as discount department stores) accounted for nearly 65% of reported sales of infants' and toddlers' wear in 1977, while representing only 25% of stores reporting sales in this category. Children's wear stores had the second highest total of sales of infants' and toddlers' wear sales in that same year, but represented only 13.7% of the industries total retail volume.

Retail Sales of Infants' & Children's Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Store types reporting sales of infants'/children's wear, total*	35,087	100.0%	$2,537.6	100.0%
Department stores	8,732	24.9	1,629.8	64.2
Women's ready-to-wear stores	5,475	15.6	190.0	7.5

(continued)

RETAIL SALES BY STORE TYPE

Infants' Wear

Retail Sales of Infants' & Children's Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)
(continued)

	Stores		Sales	
	No.	%	Mil. $	%
Family clothing stores	8,925	25.4%	$ 256.1	10.1
Shoe stores	4,108	11.7	41.6	1.6
Children's wear stores	4,225	12.0	346.4	13.7
Non-store retailers:				
Mail order houses (catalog sales)	3,622	10.3	73.7	2.9

* Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Girls'/Sub-teens' Wear

Of the close to $2 billion in reported sales of girls' and sub-teens' wear in 1977, department stores accounted for close to 64%, while representing about 27% of the total number of retail outlets covered in the Census reports.

Retail Sales of Girls' & Sub-teens' Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Store types reporting sales of girls'/sub-teens' wear, total*	30,678	100.0%	$1,939.8	100.0%
Department stores	8,191	26.7	1,239.2	63.9
Women's ready-to-wear stores	6,167	20.0	224.2	11.6
Family clothing stores	8,952	29.2	251.7	13.0
Men's wear stores	477	1.5	5.4	0.3
Shoe stores	55	0.2	0.1	#
Children's wear stores	3,239	10.6	168.8	8.7
Non-store retailers:				
Mail order houses (catalog sales)	3,597	11.7	50.4	2.6

* Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

= Less than 0.1%

Source: U.S. Bureau of the Census, 1977,
Census of Retail Trade, RC77-L.

RETAIL SALES BY STORE TYPE

Boys'/Young Men's Wear

Boys' wear sales in 1977 registered $3.9 billion with seven out of every ten of these dollars being spent in department stores. Meanwhile department stores accounted for only 25.6% of the 33,554 stores reporting sales. Family clothing stores registered a distant second to department stores in sales ringing up 11.2% of the total volume.

Retail Sales of Boys' Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Total*	33,554	100.0%	$3,898.1	100.0%
Department stores	8,575	25.6	2,737.9	70.2
Men's, boys' wear stores	5,880	17.5	378.7	9.7
Women's ready-to-wear stores	2,654	7.9	104.5	2.7
Family clothing stores	9,886	29.5	436.8	11.2
Children's wear stores	2,966	8.8	148.4	3.8
Non-store retailers:				
Mail order houses	3,593	10.7	91.8	2.4

* Includes boys' sizes 2 to 16, young men's sizes 13 to 20 and student's sizes 32 to 44, clothing, furnishings and accessories.
Total covers stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census, 1977,
Census of Retail Trade, RC77-L.

Department Stores

Department Stores: Number of Stores & Total Sales 1979-1982

	1982	1981	1980	1979	% Change 1982/1981	% Change 1981/1980
Number of Stores	na	na	9,240	9,013	na	na
Total Sales (Mil. $)	$107,030	$103,672	$96,345	$89,155	+ 3.2%	+ 11.1%

na = not available

According to the National Retail Merchants Association, every measured category of girls' and boys' wear in department stores registered increases in sales in 1981, the largest coming in the boys' furnishings group, up 11.0% above the previous year.

Every measured category of boys' wear recorded a higher gross margin in 1981 than any girls' wear group, while markdowns on boys' wear were consistently lower than those registered for girls' wear.

Department Stores

Merchandising & Operating Results in Girls' Wear Departments In Department Stores With Total Annual Sales Over $1 Million, 1981 (Typical Results)

	Girls' Clothing By Size Group				
	Sizes 3 to 6X	7 to 14	6 to 16 or 8 to 14	Apparel Accessories	Intimate Apparel
Net sales, % change from last year	+ 7.8%	+ 11.8%	+ 10.9%	+ 10.6%	+ 2.1%
Sales, % of merchandise division	6.7	14.6	5.2	7.8	4.4
Sales, % of total store sales	0.5	1.0	0.4	0.7	0.3
$ sales per square foot of selling space	$ 75.0	$ 96.5	$ 49.7	$ 91.0	$ 61.8
Cumulative markon, %	50.3%	50.7%	50.9%	50.2%	49.6%
Gross margin, % of sales incl. cash discounts	45.2	46.9	44.2	45.8	44.0
Markdowns, retail, % of sales	17.2	15.7	18.9	10.1	14.6
Returns, % of sales	8.3	9.0	10.1	2.8	4.1
Number of stock turns	3.6	3.9	3.2	2.5	2.7
Salespeople's salaries, % of sales	7.5	7.7	7.3	7.3	8.0
Sales promotions, % of sales	4.0	3.1	3.5	2.2	3.6

Merchandising & Operating Results in Boys' Wear Departments In Department Stores With Total Annual Sales Over $1 Million, 1981 (Typical Results)

	Boys' Clothing by Size Group			
	Size 2 to 6X or 8	4 to 12 or 4 to 16	13 to 20 & 32 to 44	Boys' Furnishings (All Ages)
Net sales, % change from last year	+ 7.7%	+ 4.9%	+ 6.2%	+ 11.0%
Sales, % of merchandise division	6.5	12.5	22.5	14.0
Sales, % of total store sales	0.5	1.0	2.0	0.9
$ sales per square foot of selling space	$ 75.0	$ 89.1	$104.3	$ 95.4
Cumulative markon, %	49.0%	48.5%	48.1%	49.6%
Gross margin, % of sales incl. cash discounts	43.1	40.0	38.9	44.7
Markdowns, retail, % of sales	13.8	14.6	14.2	10.8
Returns, % of sales	7.0	8.6	9.3	6.9
Number of stock turns	3.1	2.6	3.0	2.7
Salespeople's salaries, % of sales	7.2	7.6	6.1	7.4
Sales promotions, % of sales	4.1	3.3	2.7	3.9

Source: National Retail Merchants Association, Merchandising and Operating Results of 1981, (1982 Edition).

RETAIL SALES BY STORE TYPE

Seasonal Pattern

Percent of Years' Total Sales by Month
In Infants' & Children's Wear Departments
(Five Year Average)

Month	Infants' Wear	Girls' Wear	Boys' Wear
January	5.3%	3.7%	4.1%
February	5.5	4.6	4.7
March	8.6	9.1	8.0
April	7.9	7.6	7.9
May	6.2	6.1	6.3
June	5.9	5.8	6.4
July	5.9	5.8	5.4
August	8.4	11.7	10.5
September	9.2	9.0	9.0
October	9.3	8.9	8.2
November	11.3	11.1	10.8
December	16.5	16.6	18.7

Source: Newspaper Advertising Bureau
Covering 1981-1965 indexes.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage, 1981

	Girls' Sportswear & Accessories	Boys' Outer Apparel	Girls' & Teens' Dresses
January	3.4%	3.5%	1.5%
February	5.9	4.4	2.7
March	6.7	5.9	8.8
April	8.8	15.1	24.9
May	6.5	3.7	4.8
June	5.1	1.8	4.7
July	8.0	6.1	7.9
August	23.0	23.7	24.5
September	5.8	6.9	3.3
October	7.8	8.4	2.4
November	9.3	10.0	4.3
December	9.7	10.5	10.2
Total linage	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc. -- Neustadt Reports Div. (based on retail newspaper advertising linage in seven markets: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington D.C.) 1983 Newspaper Planbook.

CONSUMER PRICES

Consumer prices for all measured categories of boys' wear rose at a much slower rate in 1982 than the rate of the all items category. The only category to register an increase greater than that recorded by the total apparel group (2.5%) was furnishings whose prices were up 6.9%.

The boys' coats, jackets, sweaters & shirts group actually recorded a lower price index in 1982 than in 1981, as the index fell 0.1% to 104.7 during the period.

In March 1983, the U.S. Department of Labor reported (Daily News Record 3/24/83) that consumer prices in February 1983 were unchanged from their January level although they were 3.5% higher than the level recorded in February 1982. Reported price increases by boys' wear categories ranged from 2.1% to 3.4% higher in February 1983, when compared with the year earlier period. Increases for girls' wear ranged from a decrease of 1.8% for separates and sportswear to an increase of 6.6% for nightwear and hosiery during the same period.

Consumer Price Indexes for Specified Children's Wear Items, 1979-1982
(Dec. 1977 = 100, unless otherwise indicated)

	Annual Averages				% Change	
	1982	1981	1980	1979	1982/1981	1982/1980
All Items (1967 = 100)	282.5	260.5	233.2	204.7	+ 8.4%	+ 21.1%
Apparel (1967 = 100)	177.0	172.6	164.3	155.8	+ 2.5	+ 7.7
Boys' wear	114.6	112.0	105.6	99.9	+ 2.3	+ 8.5
Furnishings	127.3	119.1	111.5	105.8	+ 6.9	+ 14.2
Suits, trousers, sportcoats & jackets	117.2	114.8	108.2	102.9	+ 2.1	+ 8.3
Coats, jackets, sweaters & shirts	104.7	104.8	99.3	93.2	- 0.1	+ 5.4

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Infants' Wear

In January 1980, American Baby Magazine conducted a small survey among both expectant and new mothers to determine their preferences, purchases and ownership of infants' wear. Returns from 1,200 mothers, representative of the magazines circulation were used to form the basis for the survey.

This survey revealed that among expectant mothers the most commonly owned piece of infants' apparel was sleepwear with nearly three out of four respondents reporting that they had acquired this item. The least frequently owned item was reported to be soft sole shoes, as only 32.3% of the respondents stated that they had acquired through any means.

Infants' Wear

Acquisition of Infants' Wear by Expectant Mothers

	Acquired	Received as a Gift	Bought in last 6 months	Acquired through other means
Total respondents	600	600	600	600
Percent	100.0%	100.0%	100.0%	100.0%
Underwear	58.5	23.3	26.0	9.2
Sleepwear	74.7	42.2	31.5	1.0
Waterproof pants	48.8	17.7	26.7	4.4
Suits/dresses	38.7	21.3	13.0	4.4
Sacque sets	49.7	28.3	15.0	6.4
Shirts	48.0	21.3	19.7	7.0
Outerwear	48.8	24.3	14.2	10.3
Cloth/plastic bibs	59.5	30.7	20.3	8.5
Soft sole shoes	32.3	14.5	11.5	6.3

Source: American Baby Magazine, The Market For Infants' Clothing.

Among new mothers, sleepwear garnered first place in ownership while hard sole shoes received the fewest number of mentions as an item of infants' apparel which had been acquired within the last six months.

Purchases of Infants' Wear by New Mothers & by Age of Child

	Total	With a Child Aged Less Than 3 Months	With a Child Aged 3 to 6 Months
Total respondents	600	318	282
Percent:	100.0%	100.0%	100.0%
Underwear	54.5	54.1	55.0
Waterproof pants	52.5	53.1	51.8
Sleepwear	76.8	74.5	79.4
Outerwear	30.8	26.7	35.5
Suits/dresses	37.8	32.7	43.6
Jeans/slacks	27.0	16.7	38.7
Plastic bibs	17.2	13.2	21.6
Cloth bibs	31.2	26.4	36.5
Shirts	34.2	22.0	47.9
Soft sole shoes	24.7	15.1	35.5
Hard sole shoes	4.2	3.8	4.6

Source: American Baby Magazine, The Market For Infants' Wear.

CONSUMER BUYING HABITS

Infants' Wear

The following information on boys' & girls' wear purchases has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing and Research Companies, Port Washington, N.Y. The data are based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "girls" includes girls 13 years old and younger, while "boys" includes those 16 and younger.)

Boys' Wear

Distribution of Reported Boys' Wear Purchases by Type of Retail Outlet, 1982
(Percent of Units Purchased)

	Sport Coats	Suits
National chains	28.0%	44.5%
Department stores	31.5	20.8
Discount stores, incl. K mart	19.4	19.4
Specialty stores	11.6	13.9
Other store types	9.5	1.5

Distribution of Boys' Wear Purchases by Price Points, 1982
(Percent of Units Purchased)

	Sport Coats	Suits
Less than $18.00	10.3%	13.7%
$18.00 - $25.99	26.3	12.2
$26.00 - $33.99	15.4	19.2
$34.00 - $41.99	12.1	13.4
$42.00 - $55.99	17.6	12.2
$56.00 & over	18.3	29.2

Distribution of Boys' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All-Weather Coats	Raincoats
National chains	28.2%	28.4%	31.2%
Department stores	18.3	12.1	15.0
Discount stores & K mart	31.4	28.0	33.0
Specialty stores	11.3	22.7	5.4
Other store types	10.8	8.8	15.4

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Coat Purchases by Price Point, 1982
(Percent of Units Purchased)

	Jackets	All-Weather Coats
Less than $10.00	25.5%	10.5%
$10.00 - $19.99	35.7	24.1
$20.00 - $29.99	23.9	32.8
$30.00 - $39.99	8.2	7.9
$40.00 & over	6.7	24.7

	Raincoats
Less than $4.00	34.8%
$4.00 - $7.99	45.6
$8.00 - $19.99	17.2
$20.00 & over	2.4

Distribution of Boys' Pants Purchases by Store Type, 1982
(Percent of Units Purchased)

	Corduroy Jeans	Denim Jeans	Corduroy Slacks	Non-corduroy Slacks
National chains	25.6%	31.0%	24.4%	24.8%
Department stores	22.9	17.0	18.8	22.8
Discounters, incl. K mart	18.8	30.4	32.4	29.7
Specialty stores	23.6	13.4	19.6	16.3
Other store types	8.2	8.2	4.8	6.4

Distribution of Boys' Pants Purchases by Price Point, 1982
(Percent of Units Purchased)

	Corduroy Jeans	Denim Jeans	Corduroy Slacks	Non-corduroy Slacks
Less than $6.00	14.0%	23.3%	30.3%	26.8%
$6.00 - $9.99	30.5	33.3	35.0	27.6
$10.00 - $13.99	31.5	23.4	22.4	22.9
$14.00 - $17.99	18.4	14.3	8.6	13.4
$18.00 & over	5.6	5.7	3.7	9.3

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Underwear/Loungewear Purchases by Store Type, 1982
(Percent of Units Purchased)

	Undershorts	Undershirts	Pajamas/ Sleepwear Sets	Robes
National chains	26.4%	26.4%	38.5%	35.5%
Department stores	13.8	11.0	16.2	17.2
Discounters, incl. K mart	43.1	43.2	33.6	39.1
Specialty stores	4.1	6.2	5.7	5.1
Other store types	12.6	13.2	6.0	3.1

Distribution of Boys' Underwear Purchases by Price Point, 1982
(Percent of Units Purchased)

	Undershorts	Undershirts
Less than $1.00	25.5%	24.9%
$1.00 - $1.49	42.3	31.2
$1.50 - $1.99	23.0	24.6
$2.00 - $2.49	5.0	8.1
$2.50 or more	4.2	11.2

Distribution of Boys' Loungewear Purchases by Price Point, 1982
(Percent of Units Purchased)

	Pajamas/ Sleepwear		Robes
Less than $3.00	17.8%	Less than $6.00	16.4%
$3.00 - $4.99	27.6	$6.00 - $9.99	23.4
$5.00 - $6.99	17.9	$10.00 - $13.99	37.7
$7.00 - $8.99	21.3	$14.00 - $17.99	17.7
$9.00 & over	15.4	$18.00 & over	4.9

Distribution of Boys' Shirt/Sweater Purchases by Store Type, 1982
(Percent of Units Purchased)

	Sweatshirts	Polo Shirts	Sport Shirts	Dress Shirts	Sweaters
National chains	21.2%	23.8%	25.3%	23.7%	21.8%
Department stores	16.6	19.9	20.7	18.4	28.2
Discount store, incl. K mart	42.1	34.0	33.4	36.1	29.1
Specialty stores	9.2	11.9	11.2	13.0	12.0
Other store types	10.9	10.4	9.4	8.8	8.9

Source: NPD Special Industry Services, Inc.

Boys' Wear

Distribution of Boys' Shirt Purchases by Price Point, 1982
(Percent of Units Purchased)

	Sweatshirts	Polo Shirts	Sport Shirts	Dress Shirts
Less than $5.00	31.0%	55.7%	39.7%	35.0%
$5.00 - $8.99	39.5	30.5	38.2	39.1
$9.00 - $12.99	23.7	8.9	15.5	18.0
$13.00 & over	5.9	4.9	6.6	7.9

Distribution of Sweater Purchases by Price Point, 1982
(Percent of Units Purchased)

	Sweaters
Less than $6.00	22.0%
$6.00 - $7.99	20.5
$8.00 - $11.99	29.2
$12.00 - $15.99	16.7
$16.00 & over	11.6

Girls' Wear

Distribution of Girls' Dress/Skirt Purchases by Store Type, 1982
(Percent of Units Purchased)

	Dresses	Skirts
National chains	16.9%	24.0%
Department stores	32.6	22.1
Discount Stores, incl. K mart	25.2	29.4
Specialty stores	17.5	17.5
All other store types	7.8	7.0

Distribution of Girls' Dress/Skirt Purchases by Price Point, 1982
(Percent of Units Purchased)

Skirts		Dresses	
	Percent		Percent
Less than $6.00	17.9%	Less than $8.00	32.5%
$6.00 - $7.99	20.1	$8.00 - $11.99	23.6
$8.00 - $11.99	28.7	$12.00 - $15.99	18.9
$12.00 - $15.99	18.8	$16.00 - $19.99	10.5
$16.00 - $19.99	8.3	$20.00 - $29.99	10.7
$20.00 & over	5.3	$30.00 & over	4.2

Source: NPD Special Industry Services, Inc.

Girls' Wear

Distribution of Girls' Tops by Type of Outlet, 1982
(Percent of Units Purchased)

	Shirts/ Blouses	Other Tops	Sweatshirts	Sweaters
National chains	23.6%	28.5%	23.7%	21.8%
Department stores	21.8	19.2	14.6	23.1
Discount stores, incl. K mart	28.0	34.7	32.3	28.8
Specialty stores	18.6	14.4	14.8	17.5
All other store types	7.2	3.2	14.6	7.7

Distribution of Girls' Tops by Price Point, 1982
(Percent of Units Purchased)

Shirts/Blouses	Percent	Other Tops	Percent
Less than $3.00	15.1%	Less than $3.00	33.8%
$3.00 - $4.99	19.1	$3.00 - $4.99	30.3
$5.00 - $6.99	21.4	$5.00 - $6.99	18.7
$7.00 - $10.99	28.3	$7.00 - $9.99	10.4
$11.00 - $14.99	10.6	$10.00 & over	6.8
$15.00 & over	5.6		

Sweatshirts	Percent	Sweaters	Percent
Less than $3.00	4.0%	Less than $6.00	26.3%
$3.00 - $4.99	14.5	$6.00 - $9.99	37.1
$5.00 - $6.99	23.9	$10.00 - $13.99	22.2
$7.00 - $10.99	35.5	$14.00 - $19.99	10.4
$11.00 - $14.99	17.4	$20.00 & over	4.0
$15.00 & over	4.7		

Distribution of Girls' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All Weather Coats	Raincoats
National chains	22.9%	19.0%	32.9%
Department stores	18.8	28.8	14.8
Discounters, incl. K mart	31.1	39.5	28.5
Specialty stores	17.8	4.2	13.7
Other store types	8.4	7.4	9.8

Source: NPD Special Industry Services, Inc.

Girls' Wear

Distribution of Girls' Coat Purchases by Price Point, 1982
(Percent of Units Purchased)

	Jackets	All Weather Coats		Raincoats
Less than $5.00	3.0%	4.0%	Less than $5.00	37.0%
$5.00 - $9.99	8.3	20.3	$5.00 - $7.99	34.8
$10.00 - $14.99	17.0	20.9	$8.00 - $15.99	17.4
$15.00 - $19.99	17.6	20.3	$16.00 - $23.99	4.4
$20.00 - $29.99	18.1	22.2	$24.00 & over	6.5
$30.00 - $39.99	17.2	8.1		
$40.00 & over	18.5	4.2		

Distribution of Girls' Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Total Slacks	Corduroy Slacks	Non-corduroy Slacks	Denim Jeans	Corduroy Jeans
National chains	25.6%	25.2%	25.9%	22.1%	18.8%
Department stores	18.9	19.2	18.8	17.9	28.7
Discounters, incl. K mart	29.6	26.7	31.4	34.6	23.3
Specialty stores	19.5	21.5	18.3	17.0	23.1
Other store types	6.4	7.4	5.6	8.4	6.1

Distribution of Girls' Bottoms Purchases by Price Point, 1982
(Percent of Units Purchased)

	Total Slacks	Corduroy Slacks	Non-corduroy Slacks	Denim Jeans	Corduroy Jeans
Less than $6.00	30.0%	29.8%	30.0%	19.2%	14.1%
$6.00 - $9.99	35.0	31.2	37.2	34.5	36.9
$10.00 - $13.99	18.1	22.3	15.5	16.9	24.1
$14.00 - $17.99	10.6	9.2	11.4	10.9	13.7
$18.00 & over	6.5	7.4	5.8	18.4	11.2

Distribution of Girls' Suit Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Suits	Pantsuits
National chains	14.0%	18.1%
Department stores	36.3	16.9
Discounters, incl. K mart	43.1	40.1
Specialty stores	6.5	16.7
Other outlet types	--	8.2

Source: NPD Special Industry Services, Inc.

Girls' Wear

Distribution of Girls' Suit Purchases by Price Point, 1982
(Percent of Units Purchased)

Suits	Percent	Pantsuits	Percent
Less than $12.00	10.4%	Less than $4.00	15.3%
$12.00 - $13.99	8.2	$4.00 - $7.99	28.5
$14.00 - $15.99	14.1	$8.00 - $11.99	25.5
$16.00 - $19.99	26.2	$12.00 - $15.99	13.5
$20.00 - $29.99	22.7	$16.00 - $19.99	9.7
$30.00 & over	18.4	$20.00 & over	7.5

Source: NPD Special Industry Services, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (June)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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